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## ABSTRACT

The purpose of advocacy is to inform and (referral if it is) assist in to obtain services for older people where such services are not now available to them or are inadequate. This is related to the center's mission of linking older people and services together. Advocacy at the case level is concerned with individuals who have not received the services they need. Advocacy at the agency level begins with follow-up that reveals that many older people who have been referred to a particular agency are not being served by that agency for service. Sometimes advocacy may be necessary at local, state, and national levels in order to bring about changes in public policy that will add new provisions for older people or make existing provisions available to them. The constraints on the use of advocacy in an I & O center described in this report are considered as time, center image, states involved, and the possession of certain skills such as writing, speaking, and working with community groups. (Other documents in this series are available as LI 001107-001193 and LI 001195). (Author/MS)

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Information and Referral Services:

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## THE ROLE OF ADVOCACY

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(Working Draft)

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## **Chapter 1: The What and Why of Advocacy**

### **Its Definition**

In general, advocacy means to embrace or espouse a cause and/or to plead in another person's defense. Advocacy in an information and referral (I & R) center for the elderly has a more specific meaning. It means to work and plead on behalf of older people for services that are now non-existent or unavailable to them. In assuming advocacy as one of its functions, the center may:

- . press an older individual's case with another agency
- . press an agency for changes in its policies and procedures on behalf of older persons using the agency
- . press for changes in public policy on behalf of all older people in the community

### **Purpose of Advocacy**

The purpose of advocacy in an I & R center is to obtain service for older people where such service is not now available to them or is non-existent. This is related to the center's mission of linking older people and services together. As has already been indicated, there may be several reasons why advocacy may be required. An older person himself may be a barrier to the service he needs. He may not be able to state his case in a way that will elicit an agency's favorable response; his situation may be too painful for him to discuss; he may have difficulty putting his thoughts into words; he may be confused about

factual information. On the other hand, the older person may be unable to obtain an agency's services because of poor worker practice. Agency personnel may be unfamiliar with agency policy and programs or may interpret agency policy too narrowly. They may not know how to interview to obtain information from him that is necessary for providing service. The older person needs someone to speak on his behalf so that he can obtain the service he needs regardless of whether he or the individual worker in an agency is the barrier to these services.

Similarly, an older person may be prevented from obtaining services he needs because of the way an agency's programs are administered. For example, people may be required to appear in person at an agency's office before they will be considered for service or even given information about the agency's service. An agency may be hard to get to. It may not be located near public transportation or if it is, bus service may be slow, requiring long waits in the cold or rain. The older person needs someone to act on his behalf to secure those changes in an agency's practice, procedures, and policy that will enable him to obtain the services he needs.

In like manner, older persons may be unable to obtain services because public policy does not take their needs into account. Public policy may impose a standard of sub-poverty on older people or make it impossible for them to secure adequate housing. Thus older people need someone to speak on their behalf to bring about those changes in public policy that will enable them to obtain provisions and services they need.

In short, advocacy is needed in an I & R center to bring about those changes that are necessary to enable the center to link people to services and provisions that are not now available to them. There are certain constraints in the use of advocacy, however, of which you must be aware. More will be said about this later.

## Chapter 2: Advocacy at Various Levels

Advocacy in an I & R center can begin almost any place in the center's service. It can begin during information-giving if you discover that there is no service available for a particular problem. It can begin with follow-up when you learn that linkage has failed. After the cause of linkage failure has been determined, certain kinds of action might follow. These may include, by way of review:

- . correcting or updating the resource file
- . providing the older person with different or additional information about and/or referral to a different service
- . providing the person with escort service
- . correcting center or agency errors in regard to specific cases
- . record keeping for planning and research purposes as determined by the Administration on Aging

Thus, not all action resulting from follow-up will be advocacy. Nonetheless, some of it will be for the reasons already noted. How, then, do you proceed to become an advocate for the elderly and when?

### Case Advocacy: Advocacy on Behalf of Individuals

You certainly will want to do whatever you can to obtain service for the individual person at the case level. Advocacy on behalf of individuals at the case level begins with the returned referral form. If a returned referral form shows that a person is not receiving, or did not receive, service from the agency to which he was referred, and you question the agency's action, call the worker at the agency to make an inquiry regarding the agency's decision. Begin by first identifying yourself and then indicate your reason for calling. Explain that you are calling about a case that you had referred to the agency which was not accepted for service, and that you wonder why. Allow the person time to respond. Listen to what he says. If his response is not consistent with the information you have in the resource file, tell him so. This will give him an opportunity to correct the information you have on hand or give you an opportunity to ask for an appointment to discuss the case further with him. If this still leaves you dissatisfied call his supervisor or agency director to press the issue further and to interpret the needs of the person to him. If this still leaves the client without service, however, check the agency's manual. You may find that the agency is not as familiar with its own rules as you are, or if it is, does not abide by them. If so, present the agency with your information. If this still fails to produce results for the older person, advise him to take his case to the agency's appeal board and from there, to court, if necessary.



Always be courteous. You may win your point through sheer persistence which often pays off more than bombast and other attention-getting tactics. Sometimes your efforts may cause an agency to take another look at its rules and procedures or institute a new service or program. At the same time, be aware of your own fallibility. You could be pursuing a mistaken lead. If you are, acknowledge the fact and learn from your experience.

Policy or Program Advocacy: To Secure Change in an Agency's Policy or Procedures

Advocacy at the agency level begins with follow-up. For example, you may discover in follow-up that many older people who have been referred to a particular agency are not being seen by that agency for service. It is not just a matter of one or two individuals who have not been seen, but several. In following-up with individual persons, you may begin to see a pattern in their responses. The health clinic's waiting room was full when they got there. There was no place to sit. No one approached them to ask them to sit down. They waited awhile, got tired, and left.

Or perhaps you referred several persons to an agency that claimed to provide a homemaker service, only to find in follow-up that it is a companion service instead. Furthermore, you may learn that there was no attempt to find out what the persons wanted when they called. They were simply told that they had to come to the agency for an interview before they would be given information about the agency's services.

Then the service they wanted and for which they came was not there, adding insult to injury.

When you find these kinds of situations occurring, call the agency director immediately. Tell him what you have discovered in follow-up. If your observation about his agency is correct and complete, he will probably take steps to remedy the situation. It may be just a matter of adding more chairs to the waiting room. On the other hand, he may have to increase his staff to handle the clinic's business, plus provide additional training to make his staff more sensitive to the needs of older people. He may agree to inaugurate new practices in his agency to make it unnecessary for people to come to the office before they can be considered for service. In the end, the director may feel impelled to make his word good and add the homemaker service he said he offered.

These are the kinds of changes that an agency might undertake to make services available for older people. All that may be required from you is one phone call. Sometimes, though, you may have to work harder. The director may ask you to appear before his board of directors to tell them about the need for homemaker service, or he may ask you to talk to his staff about the hardship the agency's practice imposes on older people by requiring them to come to the office for an interview before they can be considered for service. Remember, persistence and courtesy are more likely to bring about the changes you desire for older people than open attack and antagonism.

## **Social Action: Advocacy at Local, State, and National Levels**

Sustained advocacy may be necessary at local, state, and national levels in order to bring about changes in public policy that will add new provisions for older people or make existing provisions available to them. Advocacy at these levels may also be necessary to effect a change in an agency's policy or practice, particularly in cases where appealing to an agency directly seems to have had little effect. Having said this, however, you should beware of identifying recalcitrant agencies and their directors by name. This is not recommended as one of the tactics to be used by the center. To attack agencies and directors openly could have serious repercussions for the center. There are many better ways to take action in the community on behalf of older people. They are as follows:

### **Reporting to the Administration on Aging and Community**

It is if turns out, for example, that you were mistaken about a person's eligibility for an agency's service, the person still may be without the service he needs. While you obviously cannot offer the person help that will be immediately beneficial to him, you can still take action on his behalf. You can and should record his situation for monthly reporting to the Administration on Aging. You also can send the same report to the newspaper as one way of reporting to the community about your linkage successes and failures which, in effect, are the community's successes and failures too. Before doing this, however, you should secure approval from the Administration on Aging. Reporting, however, is one way of arousing community concern, both locally and nationally.

### **Speaking Before and Working With Community Groups**

You can also speak to community groups about the needs of older people and the failures you have encountered in trying to link them to services that will meet their needs. You can also supply important information to community groups about the problems in securing needed provisions, and work with these groups on areas of mutual concern.

### **Writing Letters to the Editor, Congressmen, and the President**

Another way to press for community action is by writing letters to the editor, to your congressmen, and to the President. These letters should be written out of your experiences in working with the elderly and the service systems which impinge on their well-being most directly.

### **Testifying Before Official Bodies**

Testifying before official bodies is another way that you can take action in the community. Occasionally congressional committees hold hearings in different parts of the country on different issues, such as income maintenance or problems of the aged. If the issue being heard has a bearing on the well-being of older people, and if the center has knowledge and information relevant to the issue that it has accumulated through its experiences, its testimony should be heard.

Legislative hearings at state and local levels serve the same purpose as congressional hearings, at their respective levels. Again, if the issue is relevant to the concerns of the center and you have something to contribute as a result of your experience and knowledge at the center, you should do so.

## Chapter 3. Constraints and Limitations on Advocacy in an I & R Center

Ultimately you must make a decision about how far to go with advocacy in an I & R center. What are some of the constraining factors in using advocacy? Evidence seems to indicate that, while there are often few objections to the goals of advocacy, there are serious objections to the means that are sometimes used in its name, such as open confrontations, meeting take-overs, demands of one kind or another, blackmail, etc. An I & R center would be remiss in its obligation and responsibility to older people if it did not accept advocacy as its function and if it did not press for action on behalf of older people at all levels. However, certain cautions should be exercised, particularly by an agency, such as the center, that depends on government monies and good interagency relationships in both the voluntary and non-voluntary sectors for its existence.

### The Risk Involved

First of all, not every issue is worth a fight or is of equal importance. Therefore, choose issues, tactics, and strategies that are likely to yield the largest pay-offs. Some strategies are likely to produce more positive results over the long haul than others. These already have been described to you, such as calling the agency if you question its decision about a person's case, being courteous but persistent in seeing the issue through, and enlisting the support and help of community groups. Also, if you are always pressing a point,

if you are always suspecting another agency's motives and actions, if you are always pitting the older person or center against the agency, if you take every opportunity you can to publicly embarrass another agency, and if you are spending so much time trying to right the wrongs inflicted on older people that you no longer are doing what you can to link them to services that can help them, your motives and behavior may be seriously questioned. Indeed, you may well be suspected of having motives for being at the center that are inconsistent with the center's purpose and mission. In addition, you may very well be jeopardizing the well-being of older people by your attitudes and tactics.

#### Center's Image

Another constraining factor in the use of advocacy is the center's image. If people call largely to register complaints about community provisions rather than to ask for information about them, the center may not be projecting an image in keeping with its primary purpose. Further, its use may be inhibited by people who may want and need information but who do not especially want their situation to become a cause for the center to espouse. The center is primarily a linkage agency, not a complaint agency, nor is it a hall of justice where cases are heard, investigated, and vindicated. Such agencies, however, do exist. They have been established and sanctioned by law to deal with people's complaints. The center should refer to these agencies, but not take over their function.

## Time

Another constraining factor in the use of advocacy by the center is time. If you are able to do the following, then you have no problem:

- . press for favorable action on behalf of individuals with agencies
- . prepare written and oral reports for community reporting, community groups, and the newspaper
- . write letters to the editor and your congressmen
- . testify before official bodies
- . speak to community groups about the service gaps into which many older people fall
- . fulfill your first obligation to provide older people with information and referral to community provisions

On the other hand, if you cannot assume the full range of advocacy activities that have been described and at the same time fulfill your obligation of providing I & R services to people who call, select those advocacy activities that can be undertaken without undermining the center's primary mission. Thus, the constraints on the use of advocacy in an I & R center may be summarized as:

- . time
- . center image
- . the stakes involved
- . the possession of certain skills such as writing, speaking, and working with community groups

## Chapter 4: Conclusion

Advocacy in its various forms is the logical extension of follow-up in an I & R center. While all activity resulting from follow-up will not be advocacy, some of it necessarily will be, given the nature of human and organizational behavior and arrangements. Agency workers are not infallible; they can and do make mistakes; moods can and do influence their decisions on any given day. Similarly, agencies and other institutions are slow to change; their ways become set and their policies and programs do not always respond quickly to people's needs. Public policy, if not actually punitive, often reflects the attitudes of groups that are not always sympathetic to human plight.

The question, then, is not whether advocacy should be a part of an I & R center's program. The question is, rather, to what degree and in which of its forms. The answer lies partially in the availability of staff time as well as in their knowledge and skills for engaging in certain kinds of activities required by advocacy, such as speaking, writing, and working with community groups. Part of the answer also lies in the image desired for the center. If advocacy prevents people from using the center for linkage to community services, then regardless of how well the center might be performing otherwise, it has failed in its mission. The desired outcome is a balance among the major services that have been described, (information, referral, follow-up, outreach, and advocacy) each feeding into and strengthening the other to achieve the one major purpose of the center's existence--to link people to services they need.